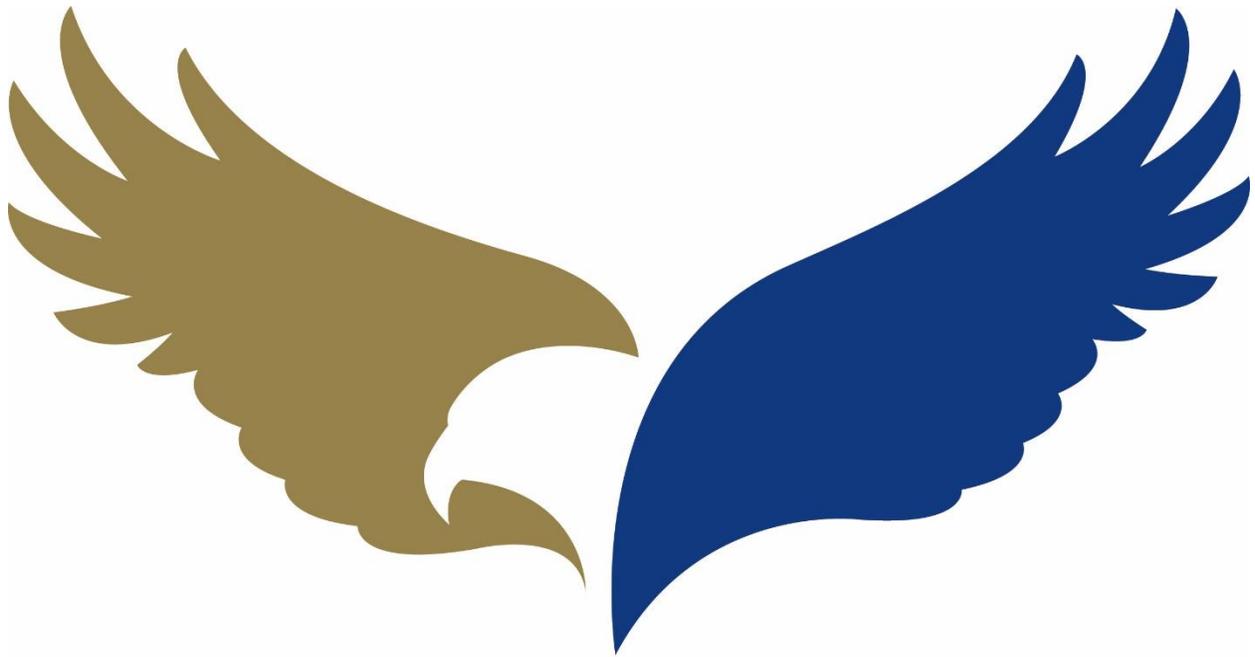


25Live Pro Event Scheduling



**CLARION
UNIVERSITY**

**Creating and Editing Searches
Guide**

25Live Pro Creating and Editing Searches

Navigating to the Searches Page

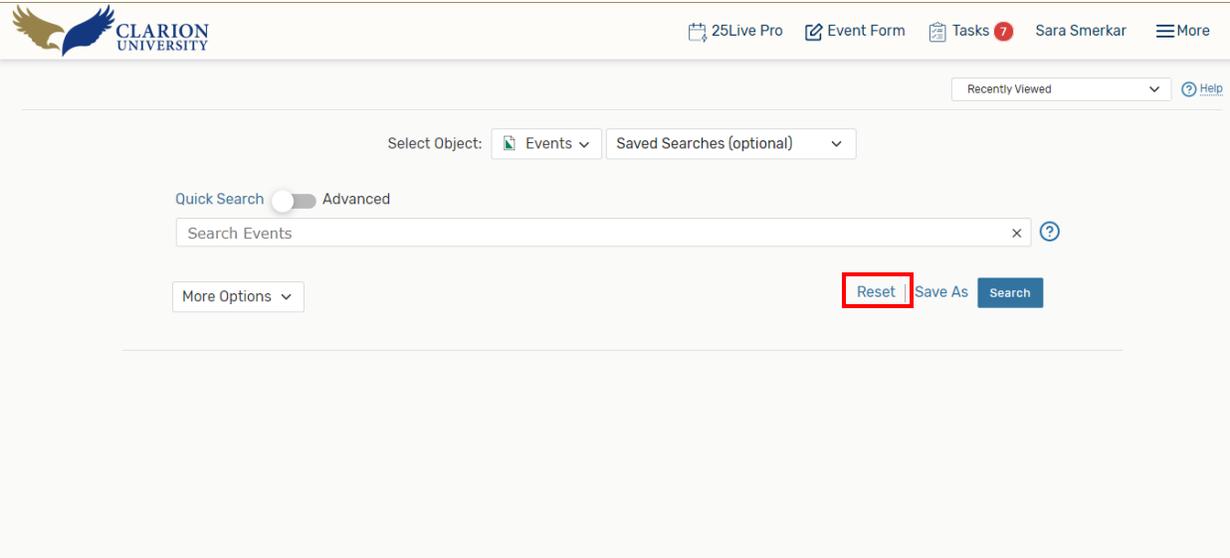
First you need to go to the search section of the program. When you first log in, you may be taken to the searches page or to your dashboard.

The screenshot shows the 25Live Pro dashboard interface. At the top, the Clarion University logo is on the left, and navigation links for '25Live Pro', 'Event Form', 'Tasks' (with a red notification badge), 'Sara Smerkar', and 'More' are on the right. A 'Go to Search' button is highlighted with a red box in the top navigation bar. Below the navigation bar, the dashboard is divided into several sections: 'Quick Search' with buttons for 'Search Events', 'Search Locations', 'Search Resources', and 'Search Organizations'; 'Your Starred Event Searches' listing 'Daily Operations Test (1)', 'Linens & Work Orders', 'Tentative Future Events no Space', and 'Test Search'; 'Your Starred Locations' with a message stating 'You do not have any Starred Locations!'; 'Your Upcoming Events' showing '8 Events in which you are the Scheduler'; and 'Express Scheduling' with fields for 'Date / Time' (Mon APR 27 2020) and '12:00 pm'. A 'Customize Dashboard' link is also visible.

If you are taken to your dashboard, there is a *Go to Search* button that you will need to “click” to be taken to the search page.

The screenshot shows the 25Live Pro search page. At the top, the Clarion University logo is on the left, and navigation links for '25Live Pro', 'Event Form', 'Tasks' (with a red notification badge), 'Sara Smerkar', and 'More' are on the right. A 'Recently Viewed' dropdown and a 'Help' link are also present. Below the navigation bar, the search page features a 'Select Object:' section with dropdown menus for 'Events' and 'Saved Searches (optional)'. A search input field contains 'Search Events' and is highlighted with a red box. Below the input field, there are 'More Options' and 'Reset | Save As | Search' buttons.

Once you “click” the *Go to Search* button, you will be taken to the searches page.

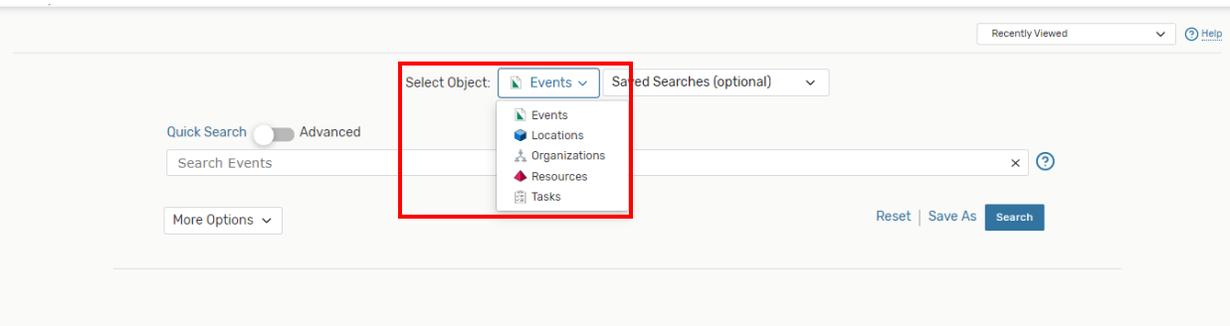


To get started, you may need to “click” the *reset* button.

Once you are at the searches page, there are a few things to know before you start creating and editing searches.

Things to Know Before Creating or Editing a Search

There are a few different options that you need to know before you start creating or editing a search.



The *Select Object* option is the first thing that you need to be aware of when creating a search.

When the *Select Object* is set to *Events*, it means that anything entered into the search bar will be searching for that event.

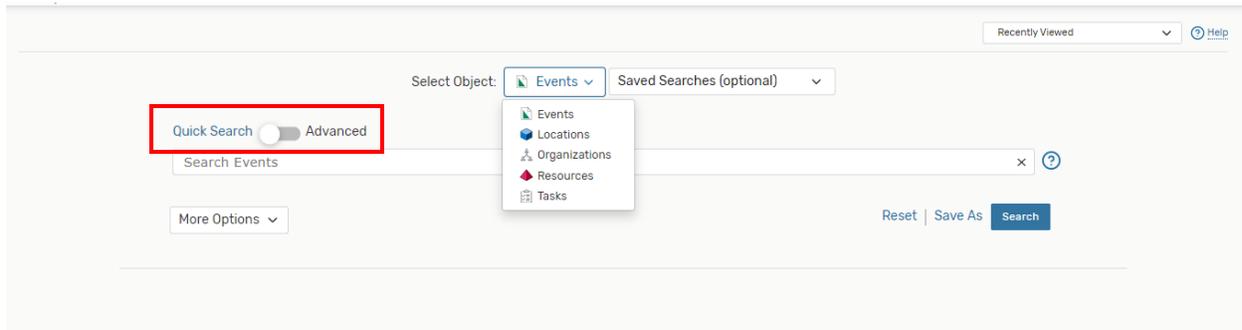
When the *Select Object* is set to *Locations*, it means that anything entered into the search bar will be searching for the location. It will NOT be searching for an event at that specific location.

When the *Select Object* is set to *Organizations*, it means that anything entered into the search bar will only be searching for a specific organization. It will NOT be searching for an event that the location was hosting.

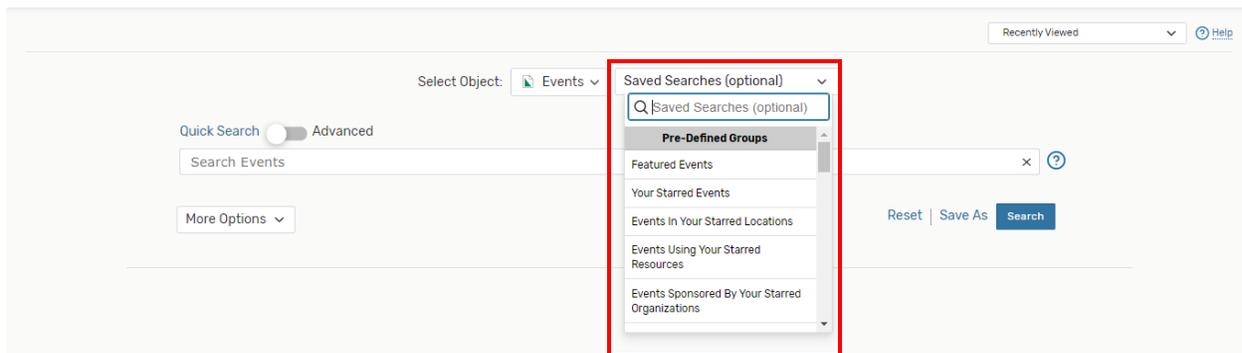
When the *Select Object* is set to *Resources*, it means that anything entered into the search bar will only be searching for resources. It will NOT be searching for an event with that specific resource.

When the *Select Object* is set to *Tasks*, it will only be searching for your specific tasks assigned to you.

The most commonly used *Select Object* is set to *Events* because it is searching for a specific event and all of its details.



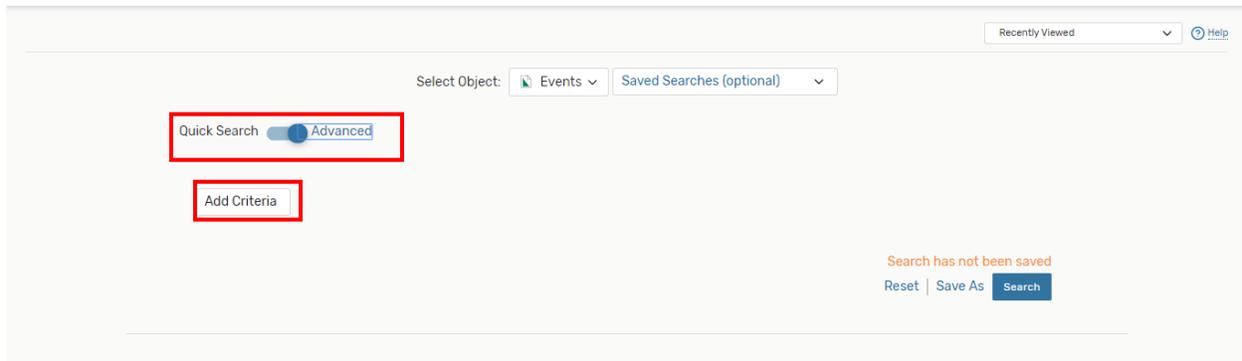
The *Quick Search* option allows for you to enter an event's name or reference number. However, if you toggle the option to be at the *Advanced Search* option, you will be able to create a more complex search.



The Saved Searches bar allows for you to view pre-defined searches, as well as, your previous searches.

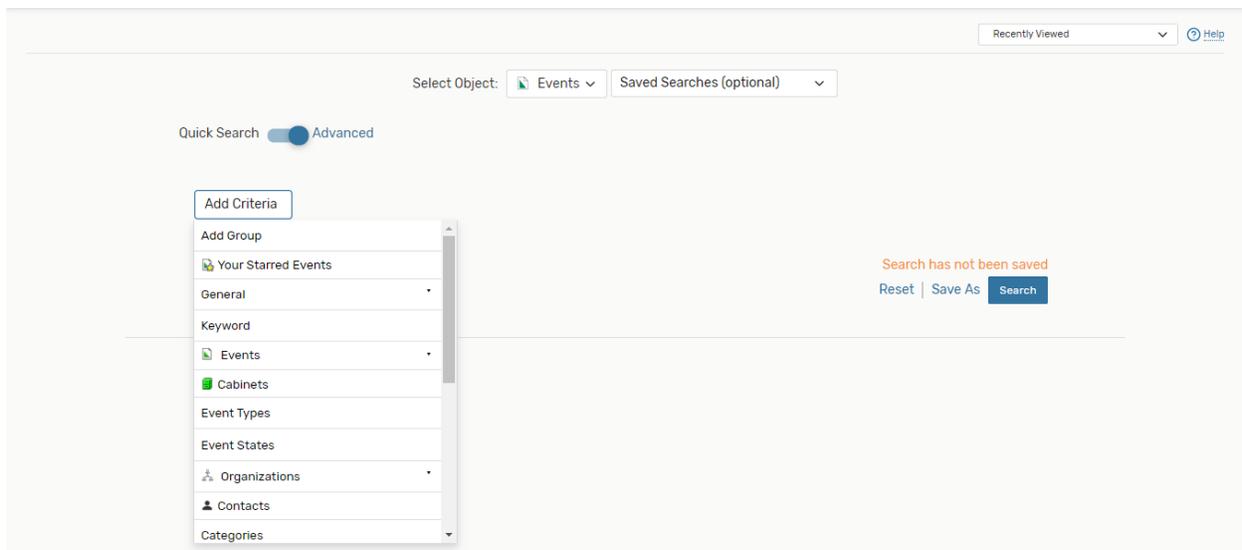
Creating a Search

If you are wanting to just find an event, you can just do a *Quick Search* and simply type in what you are looking for. However, if you are want to create a more complex search for more than just one event, then you will need to do an *Advanced Search*.



Once you toggle to the Advanced Search option, you can see that an *Add Criteria* button appears.

The *Add Criteria* button will allow for you to customize your search to help narrow down the results that you are wanting.



The *Add Criteria* button allows for many options to drop down. The options in the list will help you narrow down your search.

Once you figure out what criteria you are wanting, you will “click” it and it will appear in your search. You will then need to add information that you are wanting into that criteria.

Recently Viewed [Help](#)

Select Object: [Events](#) [Saved Searches \(optional\)](#)

Quick Search Advanced

Specific Resources X

Include Any ▾

EDIT

Add Criteria

Search has not been saved

Reset | Save As | Search

You can see that the specific resource criteria and that it is currently blank. You will then need to click edit to enter the information in that you are wanting.

Recently Viewed [Help](#)

Select Object: [Events](#) [Saved Searches \(optional\)](#)

Quick Search Advanced

Specific Resources X

Include Any ▾

EDIT

Resources X

All filters ▾ [Only Favorites](#) [Select All](#) [Select None](#) X

Done

Reset | Save As | Search

Once you “click” edit, you can see that a search bar appears for you to enter what specific thing you are looking for.

Recently Viewed Help

Select Object: Events Saved Searches (optional)

Quick Search Advanced

Specific Resources ×

Include Any ▾

Add Criteria

Search has not been saved

[Reset](#) | [Save As](#) |

By “clicking” criteria, you can continue to add different criteria until your search is complete.

Quick Search Advanced

Specific Resources ×

Include Any ▾

AND ▾

Occurrence Dates ×

Start Time: End Time:

From:

Today +/-

Specific Date

Until:

Today +/-

Specific Date

Monday Tuesday Wednesday Thursday

Friday Saturday Sunday

When you add more than one criteria, you will notice that an option for “and” or “or” appears. This is important to remember to be aware at what it is set at.

And means that you are wanting the search to pull all of the criteria that you entered.

Or means that you wanting the search to pull one criteria OR the other, not both.

Recently Viewed Help

Select Object: Events Saved Searches (optional)

Quick Search Advanced

Specific Resources ×

Include Any ▾

EDIT

Add Criteria

Search has not been saved

Reset | Save As | Search

Once you figure out what all criteria should be in your search, you can either “click” the *search* button and/or “click” the *save* button to keep it in your saved searches.

Save Search ×

Search Name:

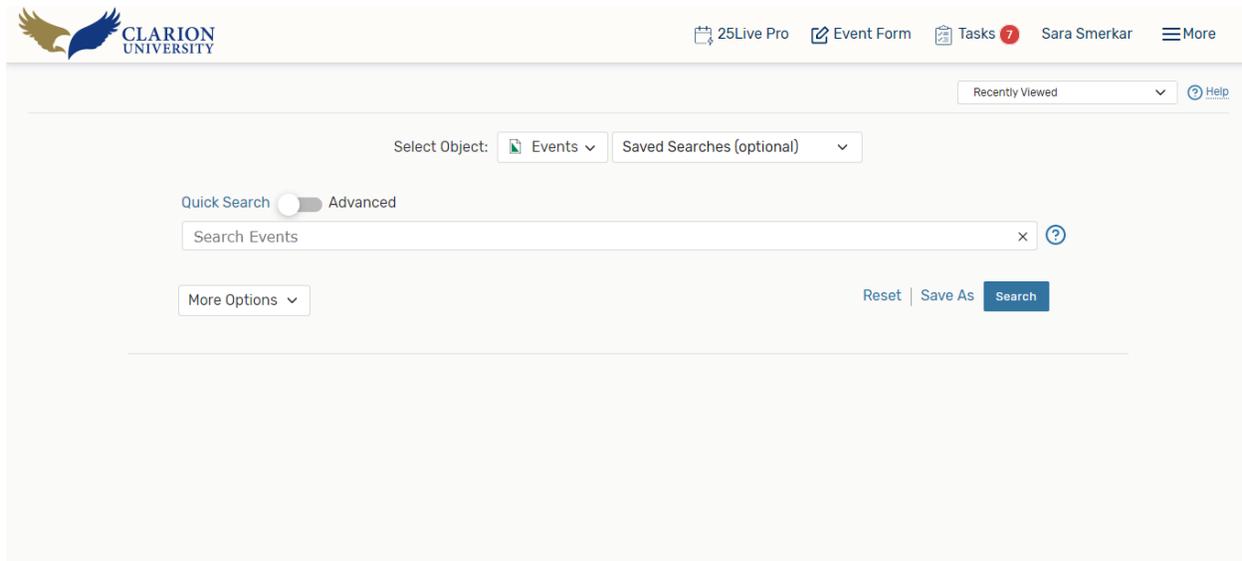
Add to starred searches: No Yes

Cancel Save

You will be able to name your search and determine if you would like it to be saved as a starred search.

Editing a Search

Editing a search means that you have created a search already and just want to tweak something in the search.

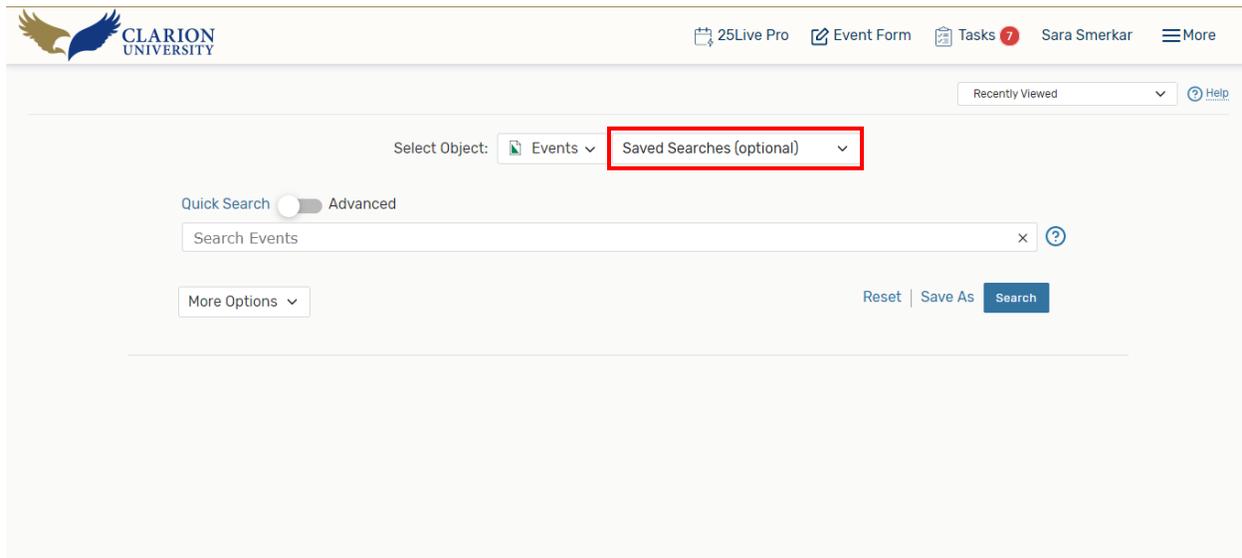


The screenshot shows the top navigation bar of the Clarion University system. On the left is the Clarion University logo. On the right are links for 25Live Pro, Event Form, Tasks (with a red notification badge), Sara Smerkar, and a More menu. Below the navigation bar is a search interface. At the top right of the search area is a 'Recently Viewed' dropdown and a 'Help' icon. The 'Select Object:' section contains two dropdown menus: 'Events' and 'Saved Searches (optional)'. Below this is a search toggle set to 'Quick Search' (with an 'Advanced' option) and a search input field containing 'Search Events'. At the bottom of the search area are 'More Options', 'Reset', 'Save As', and a blue 'Search' button.

The first thing you need to do is to go to the searches page.

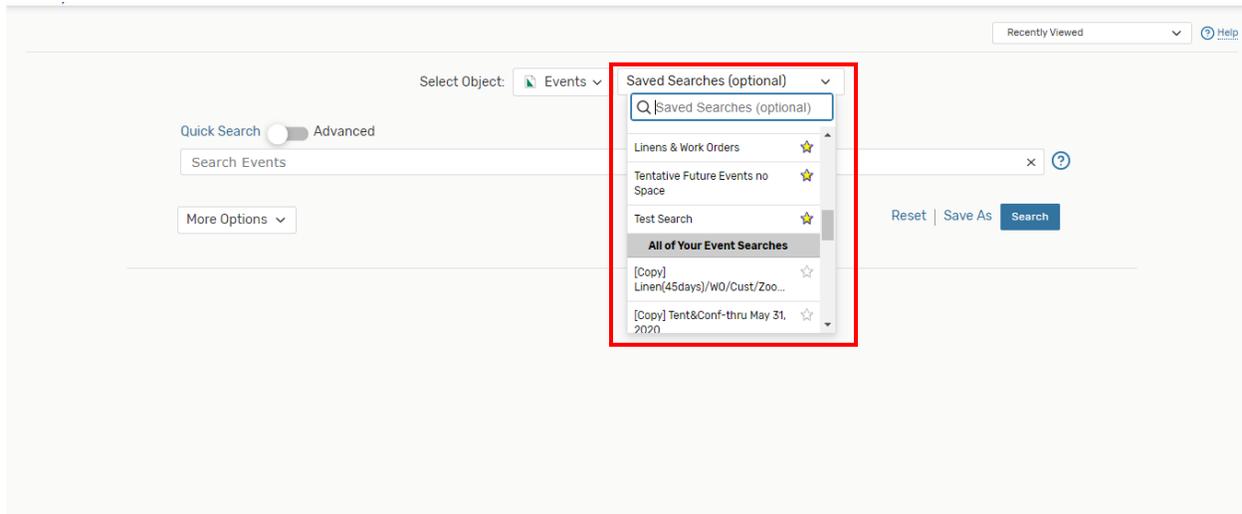
Once you are there, you will need to find the search that you are wanting to edit.

Please note, you can only edit the searches that you created or someone shared with you. You cannot edit a predefined search.



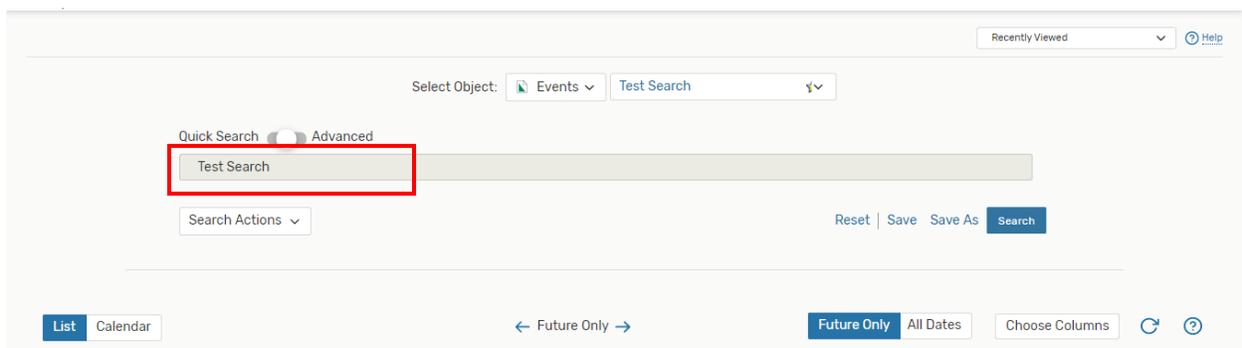
This screenshot is identical to the one above, but with a red rectangular box highlighting the 'Saved Searches (optional)' dropdown menu in the 'Select Object:' section.

To find the search you are wanting to edit, “click” the Save Searches (optional) down area.



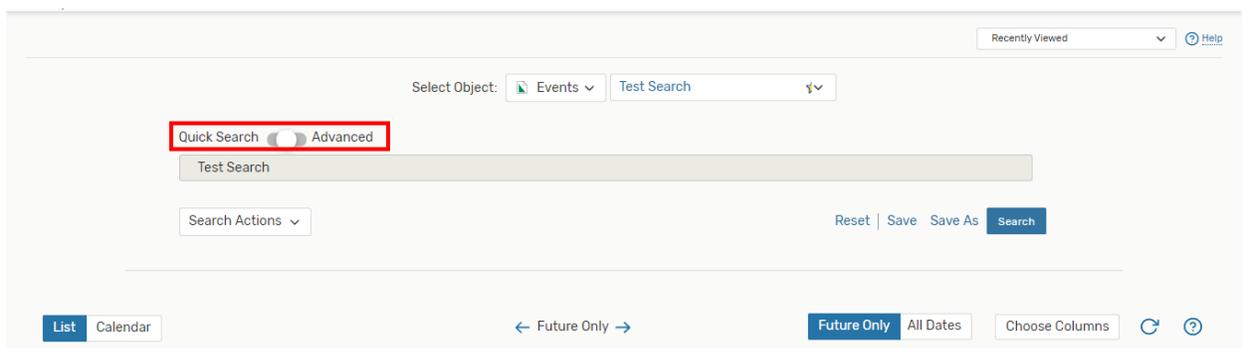
The drop down arrow will allow for you to view all of the searches.

You can then “click” which search you want to edit.



Once you find the search you want to edit, you can “click” on it and it will appear.

You can see that the search that you “clicked” is in the search bar and that the results for that search will appear below.



You will then need to toggle to the *Advanced* option to “open up the search” or edit it.

Once you toggle it to the *Advanced* option, you can see that the search criteria appears.

You can then add criteria or change things to that specific search.

Before you leave the search, you will want to save your changes.

You can do that by “clicking” the Save or Save As option.

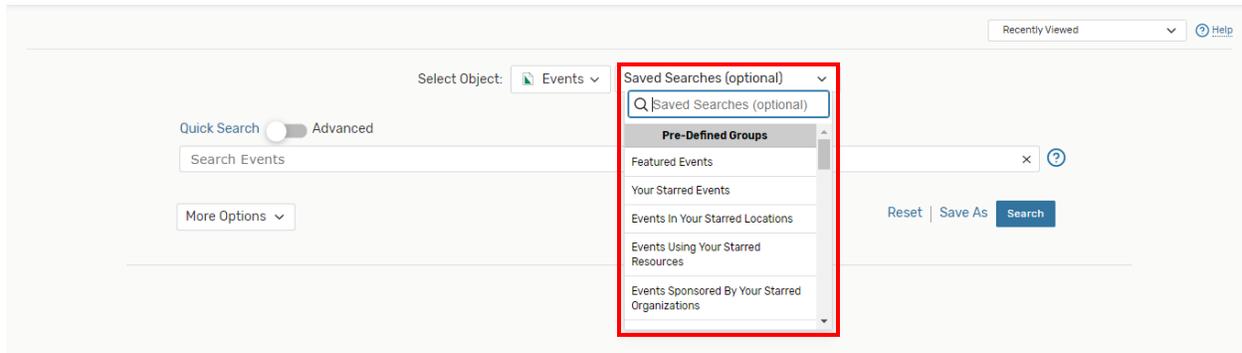
Save means that you are saving that edit in that particular search.

Save As means that you are saving that search as a new search.

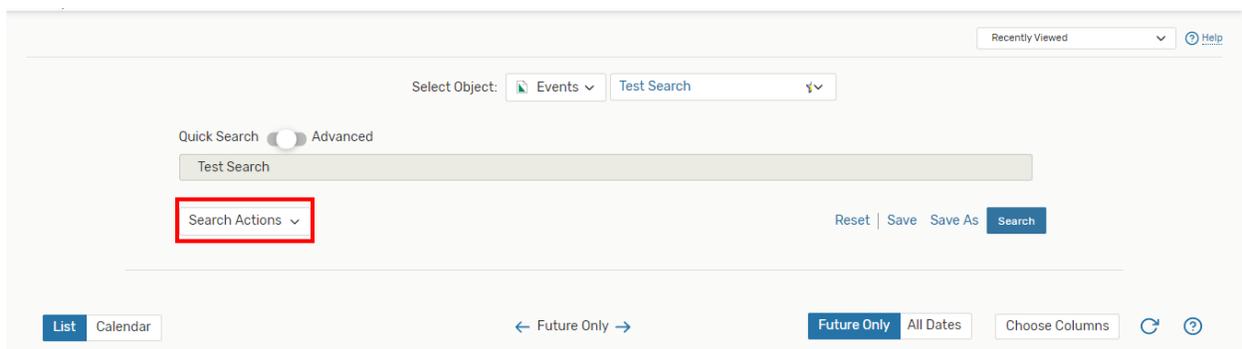
Sharing Searches

25Live Pro gives you the option to share the searches that you created with others.

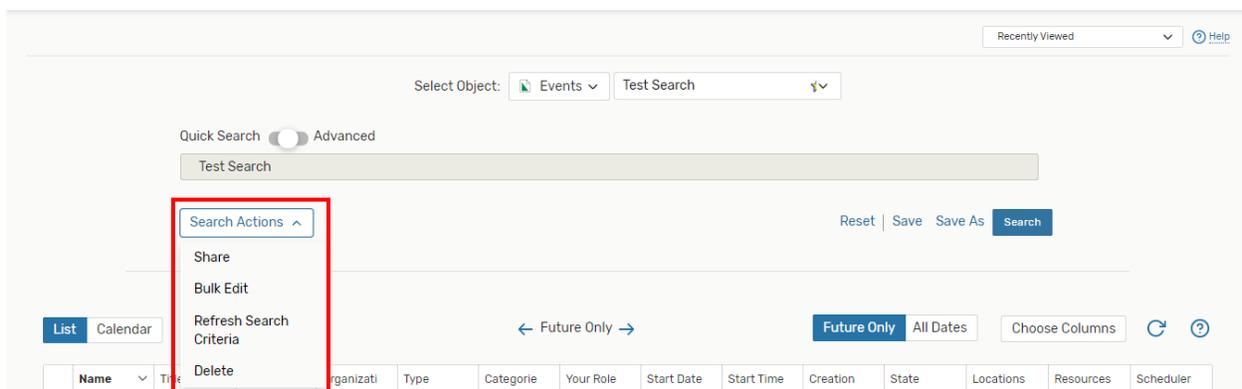
You can do that by opening up the search that you are wanting to share.



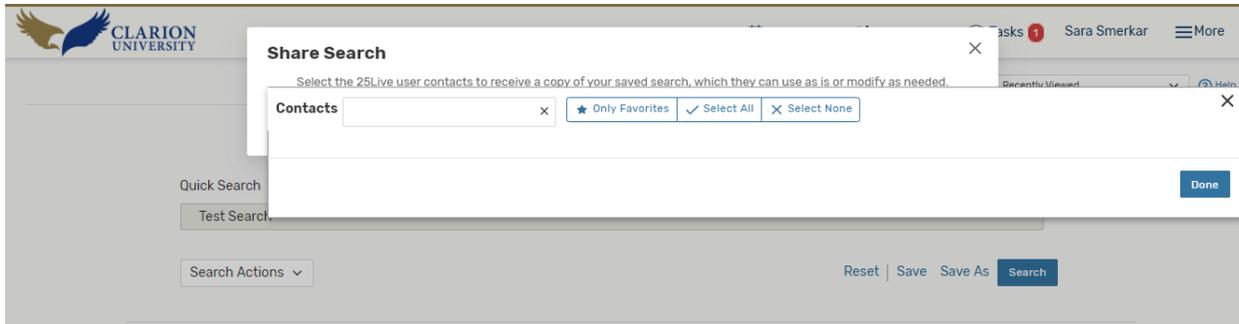
Once you find the search you want in from the drop down arrow, you can open the search.



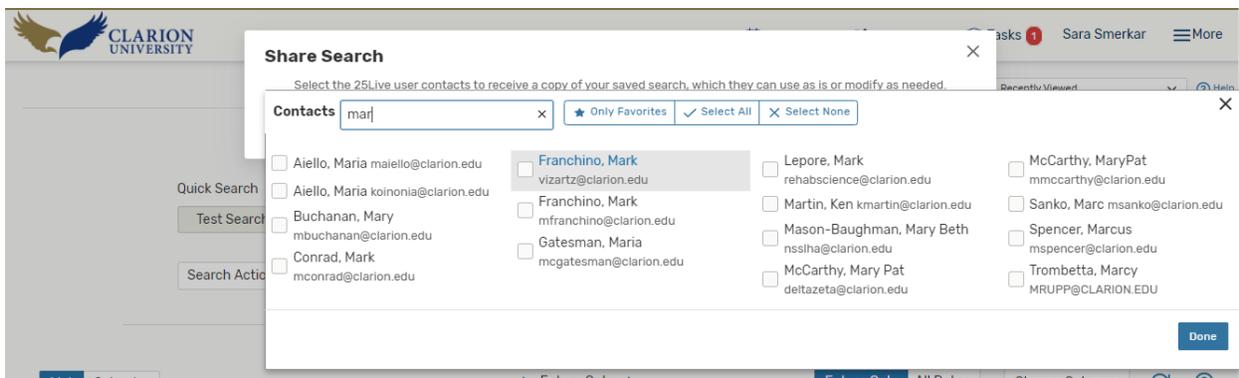
From this screen, you can “click” the *Search Actions* button to share your search.



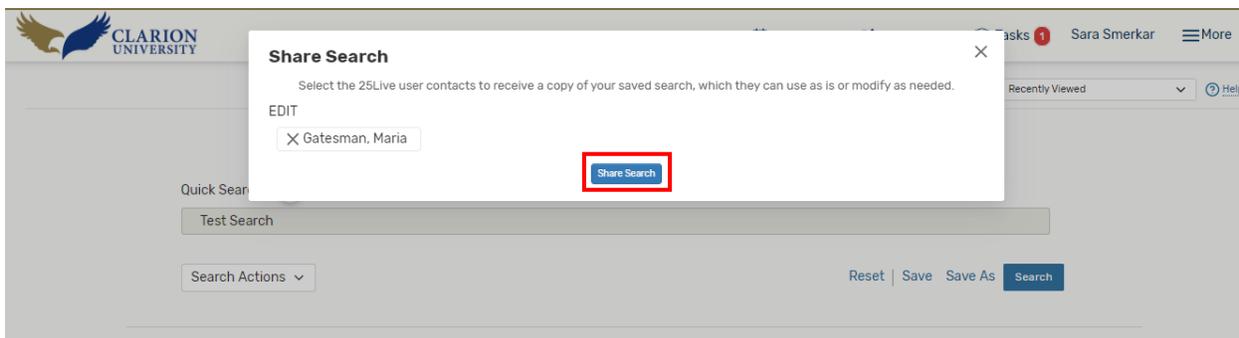
You will then “click” the *Share* button to start the sharing process.



Once you “click” the Share button, this search box will appear. You can then enter in the individuals who you would like to share the search with.



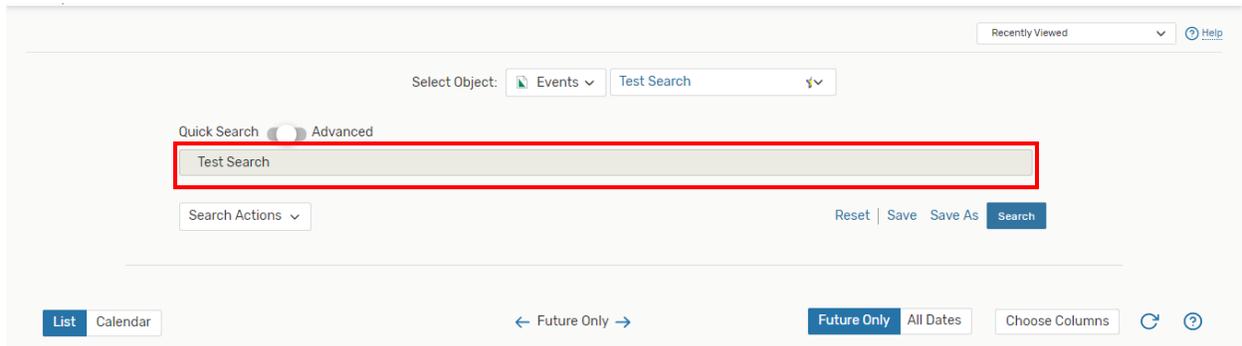
Once you type in the individual’s name, you can then check the box beside their name.



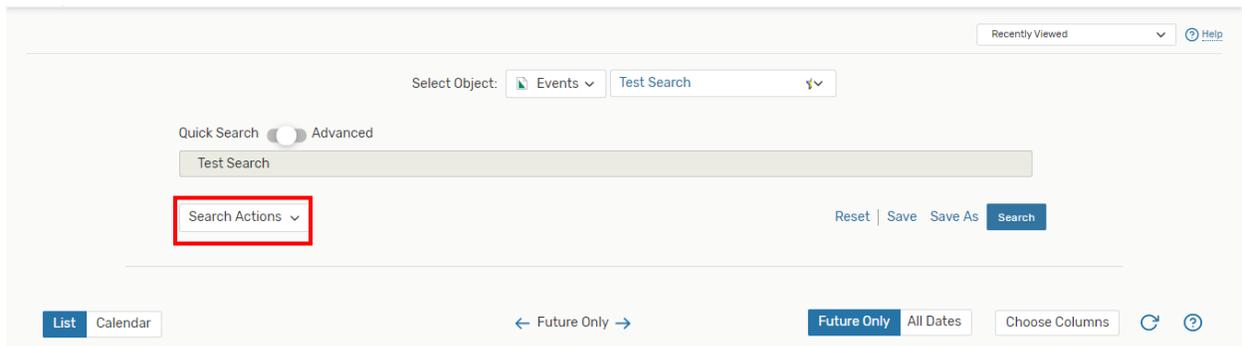
This screen will appear, and then you will need to “click” Share Search and your search will then be shared to that individual.

Deleting a Search

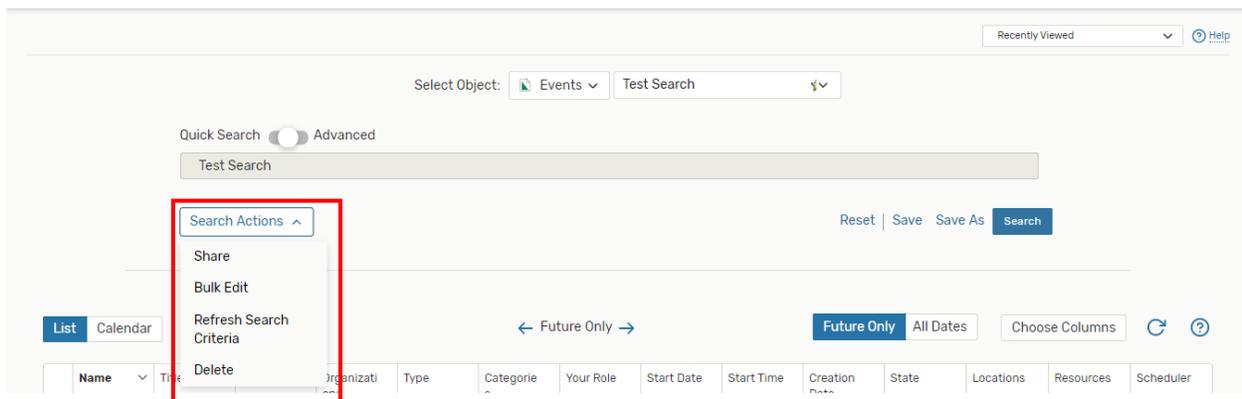
If you are done using a search, you have the option to delete it.



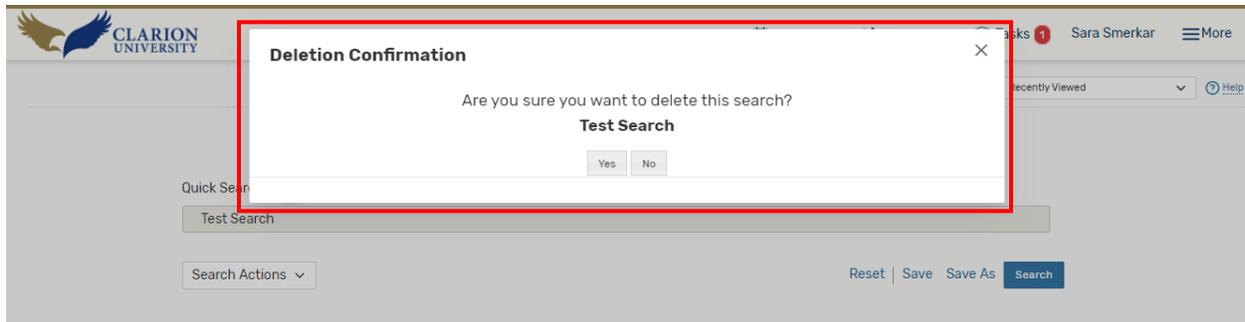
You will need to go to the search screen and “click” on the search that you are wanting to delete.



Then you will need to “click” the Search Actions button.



Once you “click” that button, the delete search option will appear.



You will then “click” the delete button and a message will appear.

You will then “click” the yes or no button. If you “click” the yes button, then your search will be deleted.